

**May 2026
OC HMIS User Meeting**

211

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Orange County
UNITED WAY

Agenda

1. HMIS Participating Agencies Schedule
2. HMIS Data Entry & Performance Impact
3. Privacy and Personal Identifying Information Guidance
4. Client Consent Form Update
5. Program Move and CES Referral Connections
6. Data Element Highlight: Disabling Condition
7. 2026 Agency Audit
8. SPM Overview
9. Project Performance Report - Goal 8 and 9 Overview
10. Project Performance Report
11. Meeting and Resources
12. Holiday
13. Survey
14. Job Opportunity
15. Q&A
16. Office Hours

Meeting materials and recording will be available on the [OC HMIS website](#)



Q&A





To better organize questions the HMIS Help Desk receives during the meeting, our Team recommends that you submit your questions through the Q&A option.

We request that you keep your questions general and related to the topics discussed in the meeting.

Agency specific questions is best supported through a HMIS Help Desk ticket submission, so our Team is able to further investigate and provide assistance for your request.

HMIS Participating Agencies Schedule

HMIS Participating Agencies Schedule																	
 																	
Requirement Type	Requirement Name	Estimated Start Date	Estimated Agency Due Date	Estimated HUD Due Date	Estimated Publication Date	January	February	March	April	May	June	July	August	September	October	November	December
HUD Required Reports	System Performance Measures Report (SPM)	October	November	February	March	Light Blue	Light Blue								Light Blue	Light Blue	Light Blue
	Longitudinal Systems Analysis (LSA)	October	December	January	April	Yellow									Yellow	Yellow	Yellow
	Housing Inventory Count (HIC)	January	February	April	May	Pink	Pink	Pink	Pink								
	Sheltered Point in Time (PIT)	January	February	April	May	Green	Green	Green	Green								
Orange County Required Reports	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February	Orange	Orange				Orange	Orange	Orange				Orange
	Emergency Shelter Project Performance Reports	May, November	June, December	n/a	July, January	Grey				Grey	Grey	Grey				Grey	Grey
	Transitional Housing Project Performance Reports	April, October	May, November	n/a	June, December				Purple	Purple	Purple				Purple	Purple	Purple
	Rapid Re-Housing Project Performance Reports	March, September	April, October	n/a	May, November			Cyan	Cyan	Cyan				Cyan	Cyan	Cyan	
	Homelessness Prevention Project Performance Reports	January, July	February, August	n/a	March, September	Green	Green	Green			Green	Green	Green				
	Permanent Supportive Housing/Other Permanent Housing Project Performance Reports	February, August	March, September	n/a	April, October		Orange	Orange	Orange				Orange	Orange	Orange		
	Data Quality Report Cards	January, April, July, October	January, April, July, October	n/a	February, May, August, November	Grey	Grey		Grey	Grey		Grey	Grey		Grey	Grey	
	Agency Audits	June	Specific to each agency	n/a	n/a							Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Orange County Requirement	HMIS User Recertifications	July	August	n/a	n/a							Pink	Pink				
	HMIS User Meeting	Monthly meetings on 1st Wednesday @ 10:00AM	n/a	n/a	n/a	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	
HMIS Lead Meetings	Data & Performance Management Meeting	Quarterly meetings on 2nd Thursday @ 1:00PM	n/a	n/a	n/a		Purple			Purple			Purple			Purple	

HMIS Participating Agencies Schedule



HMIS Participating Agencies Schedule

May

- Project Performance Reports
 - Transitional Housing
 - Emergency Shelter
 - Rapid Re-Housing
- Data Quality Report Cards
- Data & Performance Management Meeting

June

- Project Performance Reports
 - Emergency Shelter
 - Street Outreach
 - Transitional Housing
- Agency Audits Begin

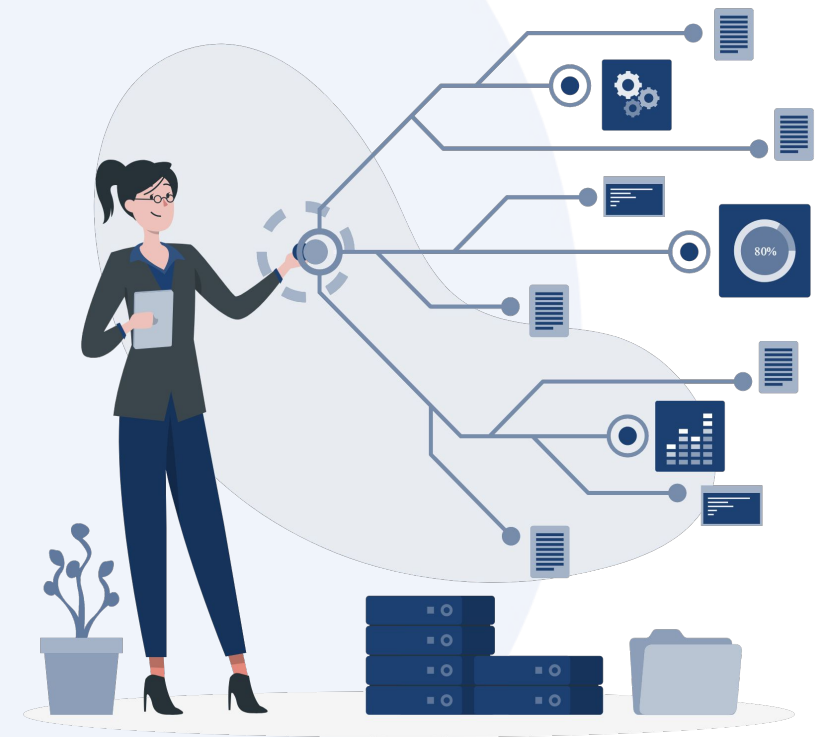
July

- Project Performance Reports
 - Emergency Shelter
 - Street Outreach
 - Homelessness Prevention
- Agency Audits
- HMIS User Recertifications

Reminder: HMIS Data Entry & Performance Impact

Data entered into HMIS is used to understand the characteristics of people served through the OC System of Care, and how effectively clients are being served through this system of care.

- Federal and State level: Data is aggregated for Orange County and submitted to inform how effectively our CoC is addressing homelessness as a system of care. Results of these reports impact the amount of funding our CoC will receive from these entities.
- Local level: In addition to reviewing data at the county-level, data is also aggregated at the project-level to inform how effective specific projects are at serving their clients. Local funders use this data to determine which agencies and projects they want to fund.



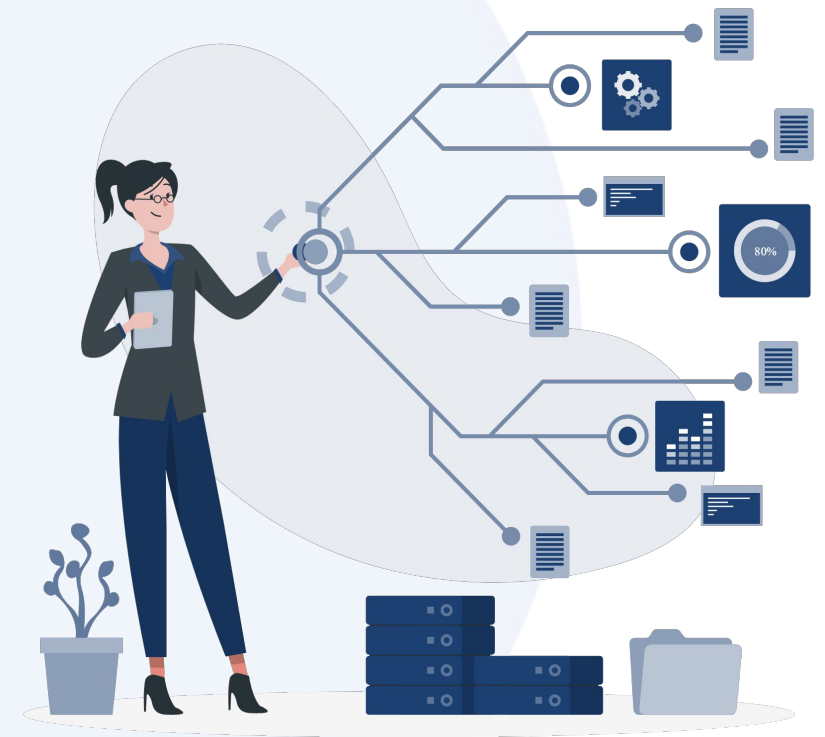
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Reminder: HMIS Data Entry & Performance Impact

This means that accurate and complete data entry into HMIS is critical to ensure that your agency, and our CoC as a whole, continues to receive the funding needed to address homelessness in our community.

Data Entry & Data Quality Best Practices:

- Search for client records in HMIS prior to entering new clients to avoid duplicate profiles for the same client
- Confirm name spelling and review client documentation (if possible) to reduce data entry errors for Name, Date of Birth, and Social Security Number
- Enter data into HMIS directly instead of collecting data on a paper form
- Run data quality and performance reports at least quarterly to correct errors and identify areas for additional training
- Review data quality and performance correction files sent from the HMIS team, and update HMIS as needed
- Review knowledge base articles and training materials to understand how to collect specific data elements



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Reminder: Privacy and Personal Identifying Information Guidance

A reminder about Client Privacy and Personal Identifying Information

Best practices for sharing client information:

- Users should only use the **client's unique identifier** to identify clients in correspondence. This includes HMIS tickets, reports, work emails, and work related instant messaging apps.
- If users must share additional client information such as name, date of birth, or Social Security Number in a report or correspondence, please use an encrypted email or password protected file on your work network. If you are sending a report to HMIS, please use your agency's DropBox.
 - [Sending Client Information to the HMIS Help Desk](#)



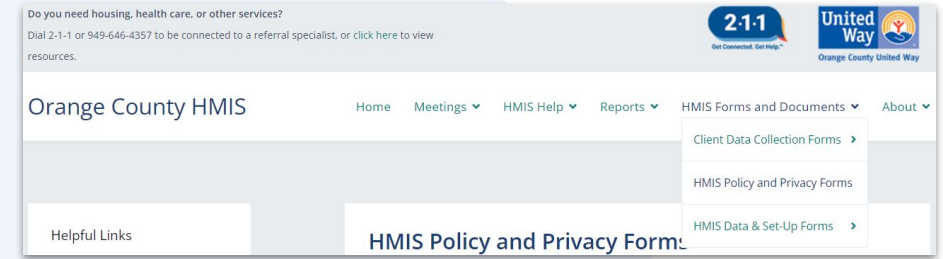
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Client Consent Form Update

The final page of the HMIS Consent to Share Protected Personal Information Form has been updated to reflect changes in the roster of HMIS participating agencies.

This form can be found on [our website](#) by navigating to: HMIS Forms and Documents > [HMIS Policy and Privacy Forms](#) > Consent to Share Protected Personal Information

A complete list of all agencies that participate in OC HMIS can be found at: <https://ochmis.org/contributing-agencies/>



Program Move and CES Referral Connections

If users mistakenly enroll a client in the wrong program HMIS Agency Admins can submit a ticket to the HMIS Helpdesk to perform a Program Move, and transfer that enrollment to the correct program.

A Program Move is not appropriate for clients who need to transfer enrollments to continue receiving services due to funding constraints.

Those clients should have two separate enrollments to maintain an accurate historical record of their enrollment history.



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Program Move and CES Referral Connections

When working with enrollments that have Coordinated Entry System (CES) referrals attached, please exercise caution. HMIS Agency Admins should never delete an enrollment with a CES referral connection.

Instead, a Program Move must be requested. This ensures that the CES referral remains properly linked and the Program Move will reflect the accurate program the client is enrolled in. This step is critical for maintaining data integrity and ensuring clients remain accurately connected to their referrals and housing placement processes.

[Program Moves and CES Referral Connections](#) Knowledge Base Article

Original program enrollment in wrong program

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
CoC Funded Permanent Supportive Housing Training Project PH - Permanent Supportive Housing (disability required for entry) OC Training Agency ⓘ	04/27/2026		Active Individual 

Deleted the wrong program enrollment and created a new enrollment will result in the losing CES linkage

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
CoC Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing OC Training Agency ⓘ	04/27/2026		Active Individual 

Program Move into the correct program will keep the CES linkage intact

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
CoC Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing OC Training Agency ⓘ	04/27/2026		Active Individual 

Data Element Highlight: Disabling Condition

3.08 Disabling Condition

Data Collected About - All Clients

Funder: Component - All Programs

Project Type - All Projects

Collection Point - Project Start

HUD defines a disabling condition is one or more of the following:

- As a physical, mental, or emotional impairment (including substance use disorder, PTSD, or brain injury) that:
 - Is long-term or of indefinite duration
 - Substantially limits the person's ability to live independently
 - Could improve with more suitable housing
- A developmental disability
- The disease of acquired immunodeficiency syndrome (AIDS) or any condition arising from the etiologic agency for acquired immunodeficiency syndrome (HIV)

Documentation is not required. Only projects that receive funding with eligibility criteria will need to collect documentation for disabling condition.

DISABLING CONDITIONS AND BARRIERS			
Disabling Condition	Yes	▼	
Physical Disability	Yes	▼	Long Term Yes ▼
Developmental Disability	No	▼	
Chronic Health Condition	No	▼	
HIV - AIDS	Yes	▼	
Mental Health Disorder	No	▼	
Substance Use Disorder	No	▼	
Survivor of Domestic Violence	No	▼	

Disabling Condition Cont.

Scenario 1: “Yes” to Disabling Condition, but “No” to all disability types.

User must review Disabling Condition = Yes for accuracy and determine if:

- The client has a specific disability that is expected to be long-term and impair the ability to live independently.
- The client has a developmental disability or has HIV/AIDS.
- If the client response is no to both, then the client does not have a disabling condition.

DISABLING CONDITIONS AND BARRIERS		
Disabling Condition	Yes	▼
Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	No	▼
HIV - AIDS	No	▼
Mental Health Disorder	No	▼
Substance Use Disorder	No	▼


⚠ Disabling Condition is set to 'Yes,' but no long-term disability type has been selected, which may lead to data quality errors. Please update Disabling Condition or select at least one disability type as long term, if applicable.

Disabling Condition Cont.

Scenario 2: “No” to Disabling Condition, but “Yes” to a disability type that is expected to be *long-term*

- If HIV-AIDS or Development Disability is selected, Disabling Condition must be “**Yes.**”
- If a condition is marked “**Yes**” and is *long-term*, Disabling Condition must be “**Yes.**”
- If the condition is not long-term, Disabling Condition must be “**No.**”

Ensure the main Disabling Condition field aligns with the selected conditions and duration.

DISABLING CONDITIONS AND BARRIERS		
Disabling Condition	No	▼
Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	No	▼
HIV - AIDS	Yes	▼
 You have selected "Yes" for HIV-AIDS but "No", "Client doesn't know", "Client prefers not to answer", or "Data not collected" for Disabling Condition. Please correct the Disabling Condition field or the HIV-AIDS field, as appropriate.		
Mental Health Disorder	No	▼
Substance Use Disorder	No	▼

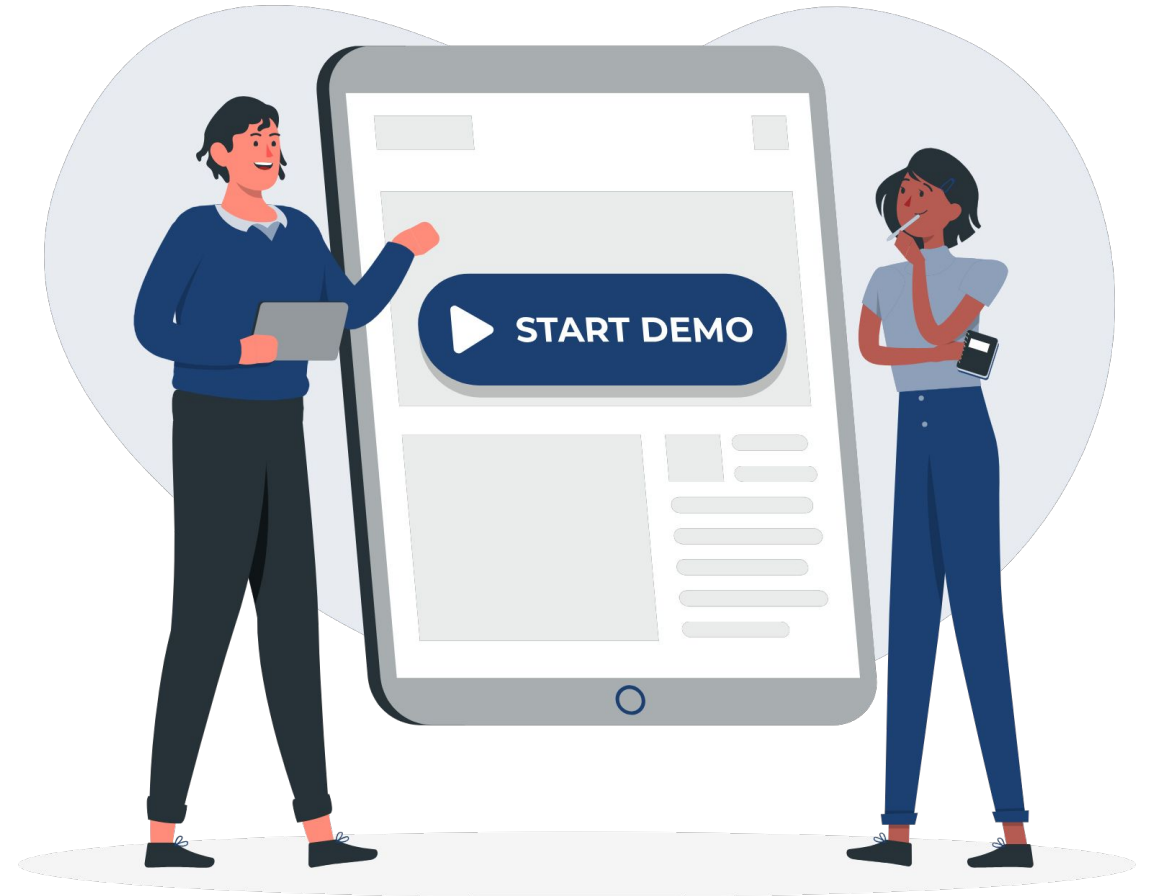
Disabling Condition + Program Specific Data Element

Disabling Condition (Universal Data Element) correlates with the Disability/Health Condition (Program Specific Data Element). The distinction is UDE is collected for all clients for all programs and PSDE is only collected for specific funded programs (HUD, ESG, HOPWA, PATH, RHY)

Disability/Health Condition	Rationale
4.05 Physical Disability *	<ul style="list-style-type: none">• If each client has a physical disability, a physical impairment.
4.06 Developmental Disability	<ul style="list-style-type: none">• Indicate if each client has a developmental disability, a severe, chronic disability that is attributed to a mental or physical impairment.
4.07 Chronic Health Condition *	<ul style="list-style-type: none">• If the client has a chronic health condition, a diagnosed condition that is more than three (3) months in duration and is either not curable or has residual effects
4.08 HIV/AIDS	<ul style="list-style-type: none">• Indicate if the client has HIV/AIDS.
4.09 Mental Health Disorder *	<ul style="list-style-type: none">• If each client has a mental health disorder, may range from situational depression to serious mental illnesses.
4.10 Substance Use Disorder *	<ul style="list-style-type: none">• If each client has the indicated disability: alcohol use disorder or/and drug use disorder

*And if there is indication that the disability is expected to be of long-continued and indefinite duration and substantially impair the client's ability to live independently.

Data Element Highlight: Disabling Conditions Demo



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Disabling Conditions Quiz

1. A client has a condition that is not expected to be long-term. Does this qualify as a disabling condition?
2. What is the error with this Disabling Condition entry? Choose the most accurate response.

DISABLING CONDITIONS AND BARRIERS		
Disabling Condition	Yes	▼
Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	No	▼
HIV - AIDS	No	▼
Mental Health Disorder	No	▼
Substance Use Disorder	No	▼

3. If “Yes” is selected for disabling condition, what must also be true?

2026 Agency Audits

- The HMIS Helpdesk Team will begin conducting agency audits for 2026.
- We will reach out to your agency 2 weeks before the available audit meeting dates so you have a few options to schedule the audit and you have time to prepare for the audit.
- Please be on the lookout for our email to schedule your Agency Audit in June. We will be scheduling audits throughout the summer and fall months to accommodate all the agencies.



System Performance Measures (SPM) Overview

- CoCs are required to measure their performance annually as a coordinated system and submit the results to HUD
- System Performance Measures (SPM) allow the CoC to evaluate and improve their performance as a whole
- SPM results are incorporated into the CoC application score, which impacts the grants awarded through the CoC Program funds



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Report Specifications

- Data is pulled annually from 10/1 through 9/30
- Current reporting period: 10/1/24 – 9/30/25
- Year-over-year trends and HUD submission are available on the [HMIS website](https://ochmis.org) (ochmis.org > Reports > HUD System Performance Reports)

HMIS Project Types

Street Outreach

Emergency Shelter

Transitional Housing

Rapid Re-Housing

Permanent Support Housing

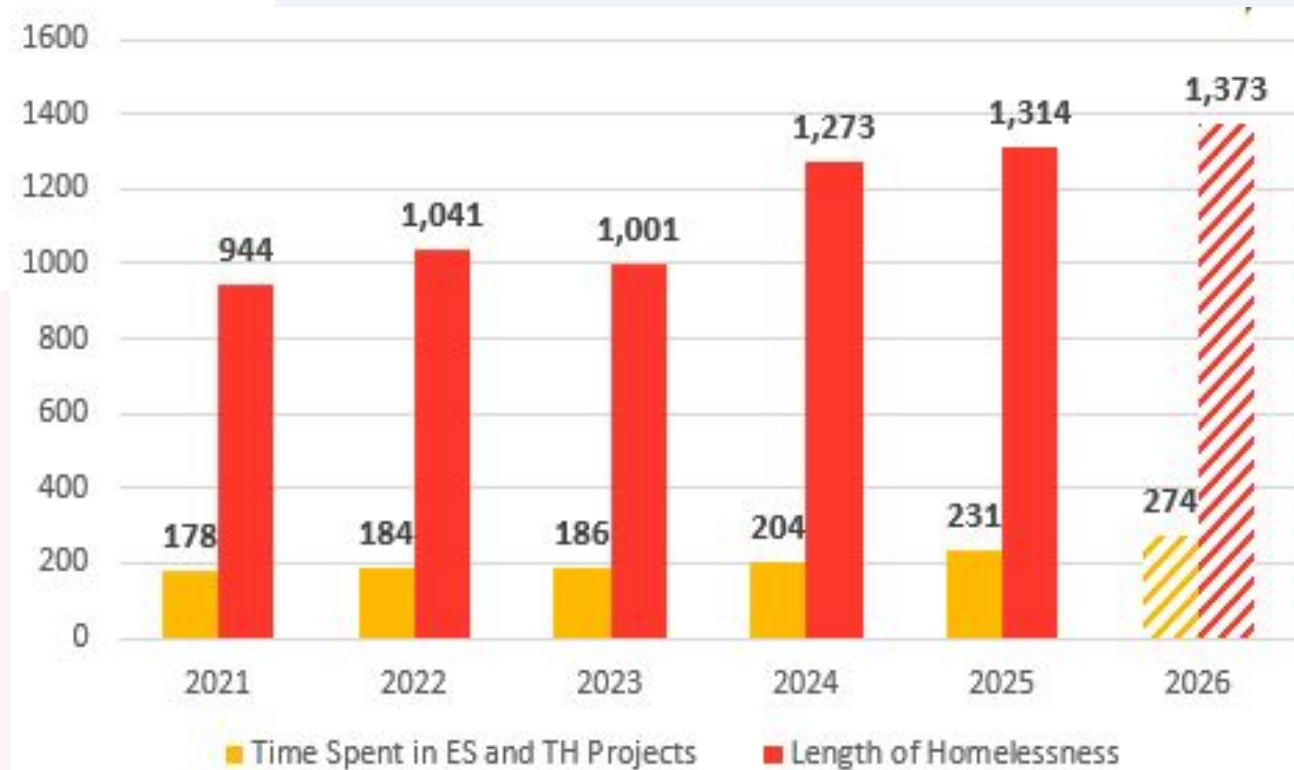
Other Permanent Housing

SPM Measure Review

- Performance scores submitted to HUD over the past five year in solid yellow or red bars
- Performance for the current fiscal year in bars with diagonal lines
- Metrics and possible points from the previous CoC Application
 - Note that the CoC Application scoring is subject to change
- Metrics from the OC Strategic Plan

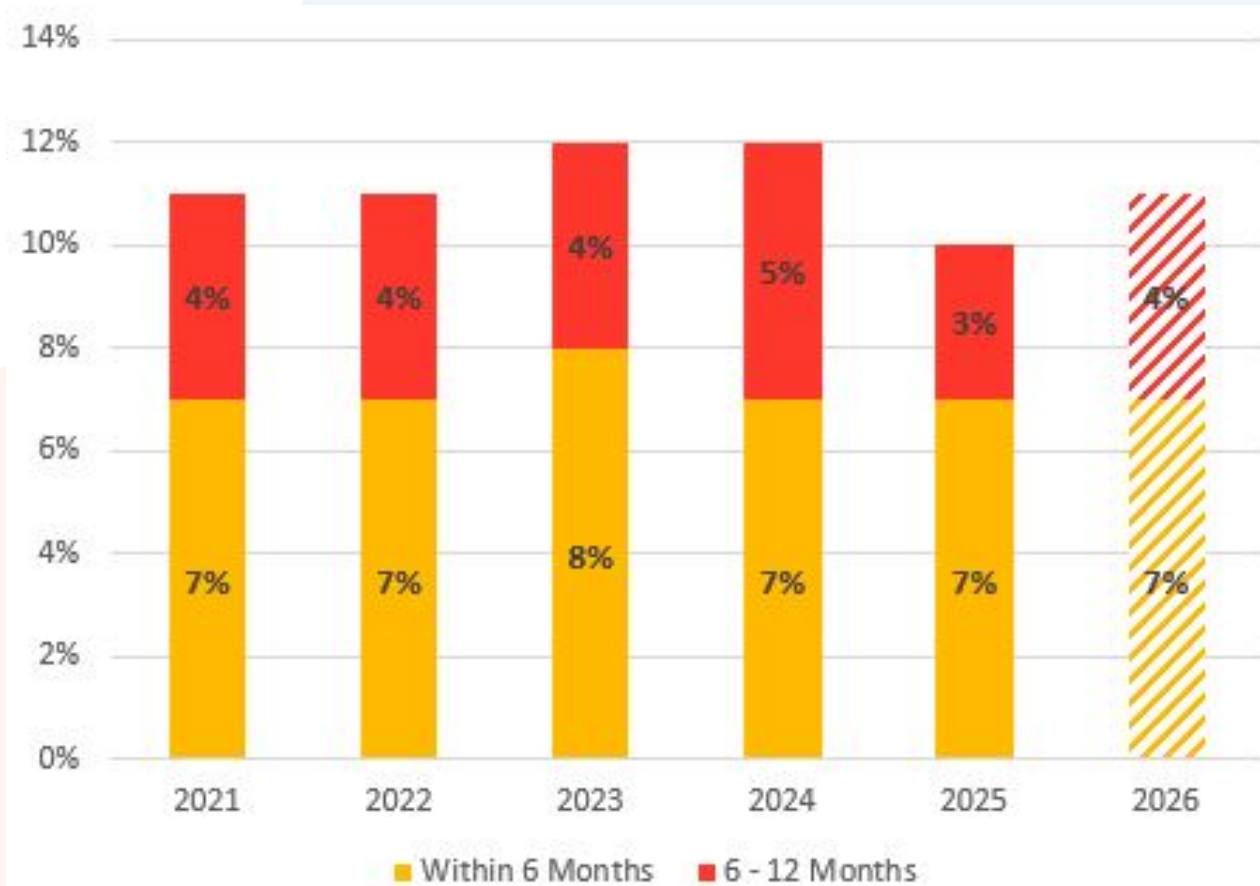
Measure 1: Length of Homelessness

- 1a: Days clients spend in ES or TH projects
- 1b: Days clients have been in their current episode of homelessness, including time prior to enrollment



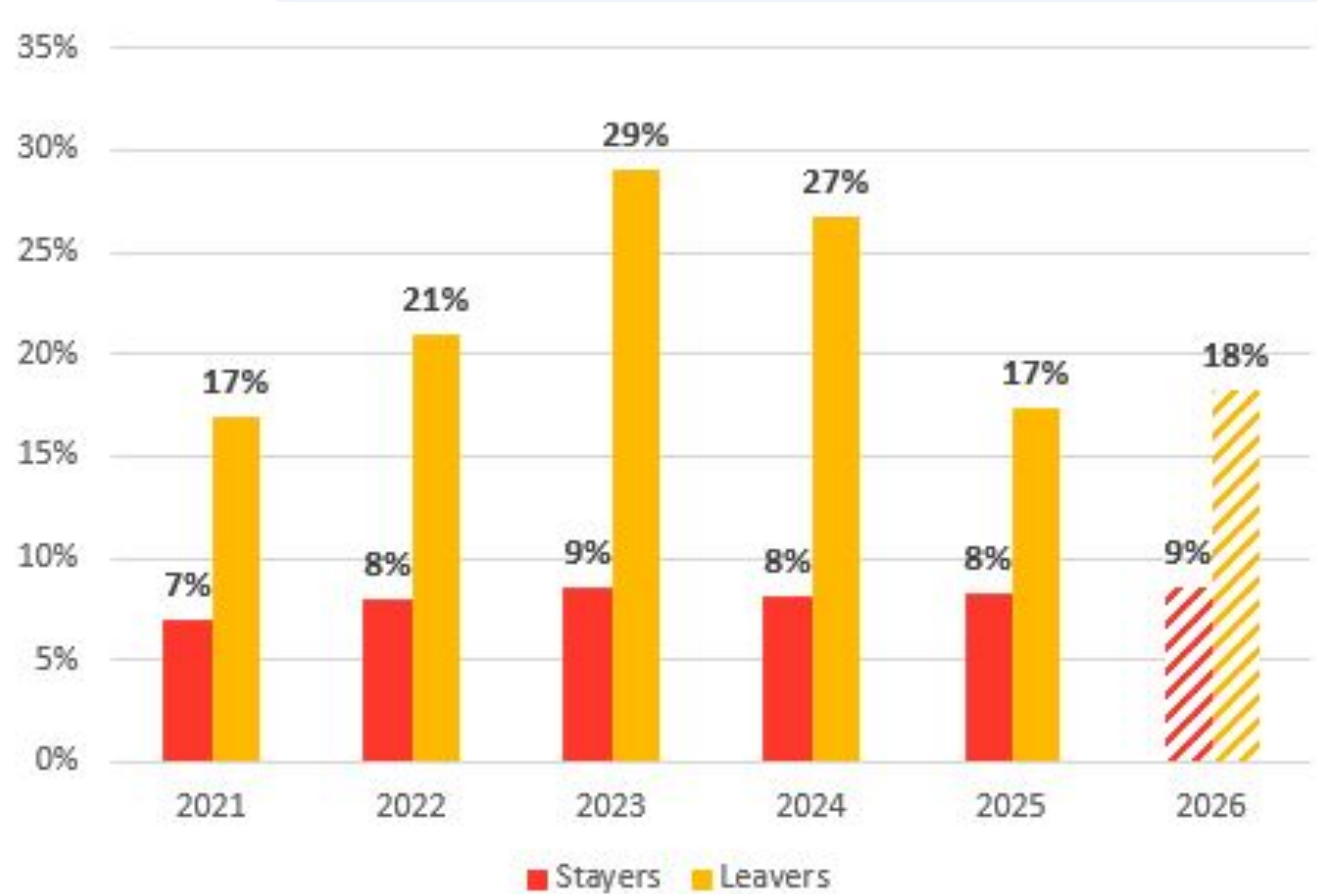
Measure 2: Returns to Homelessness

- People return to the system of care after exiting to permanent destinations



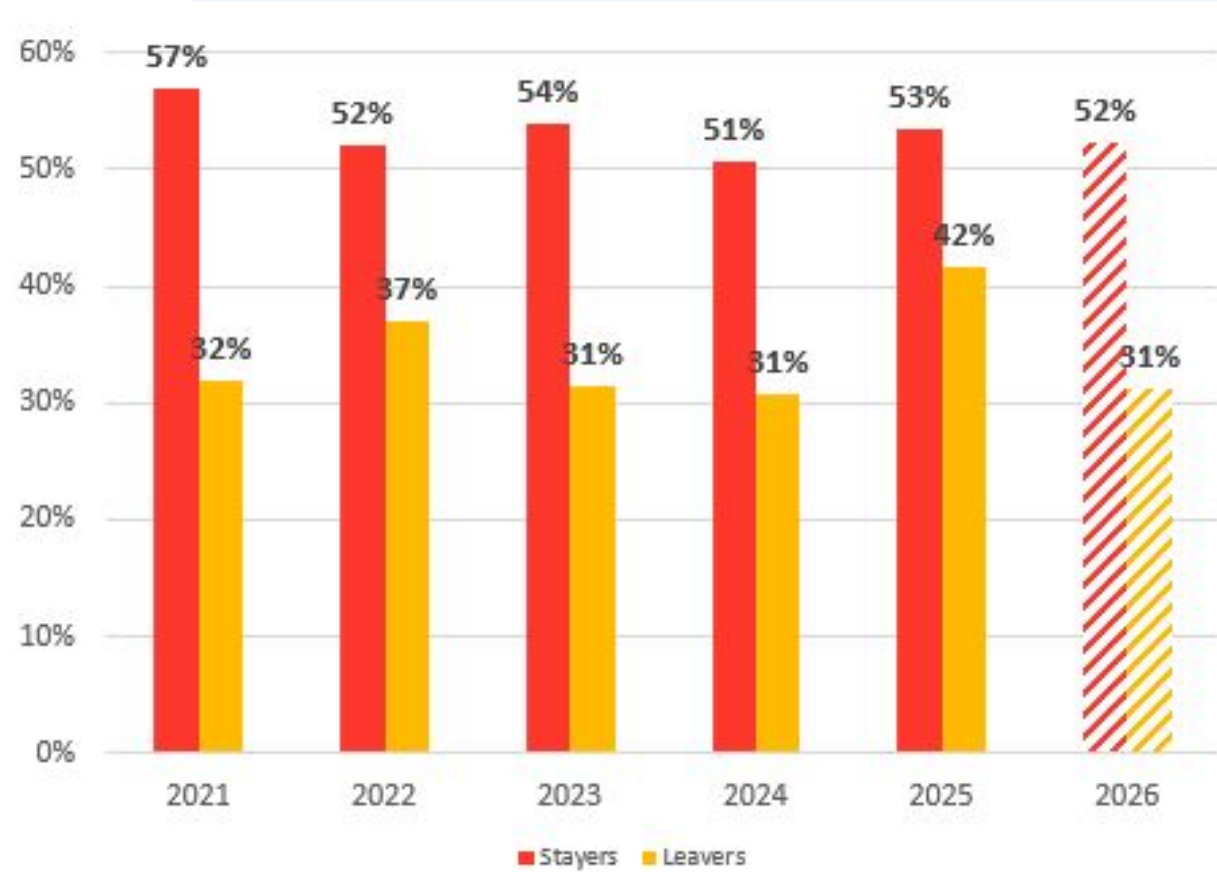
Measure 4.1 and 4.4: Increase Employment Income

- Adults that increased earned income during enrollment and at exit



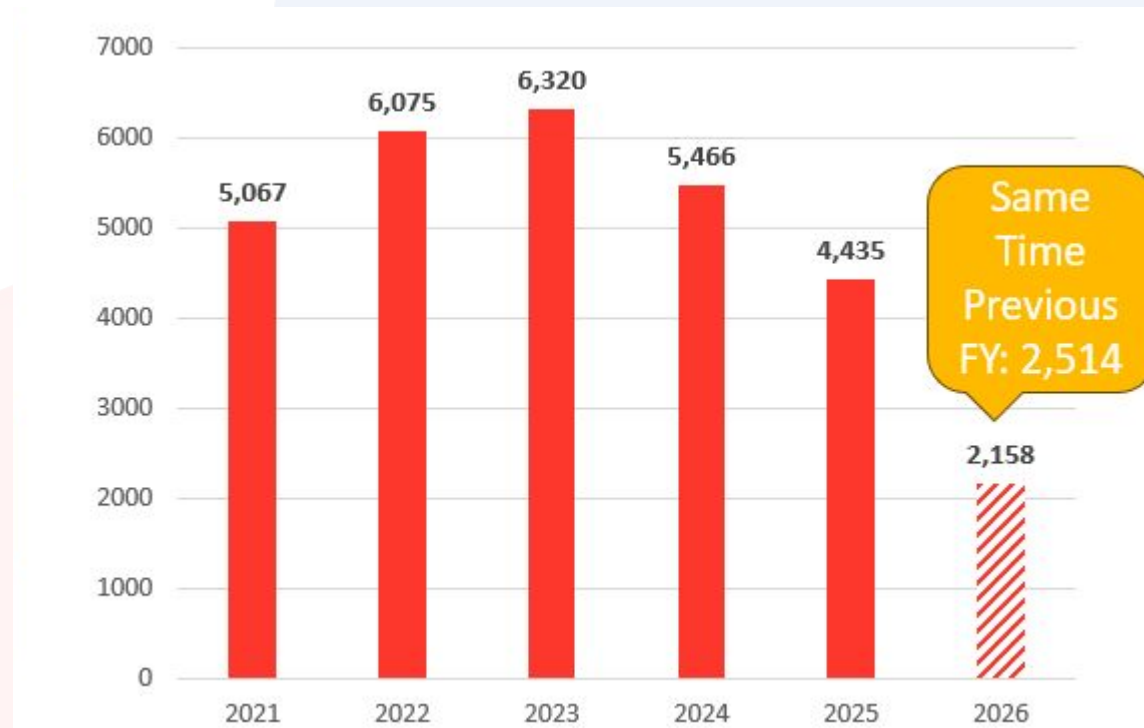
Measure 4.2 and 4.5: Increase Non-Employment Cash Income

- Adults that increased non-employment cash income during enrollment and at exit



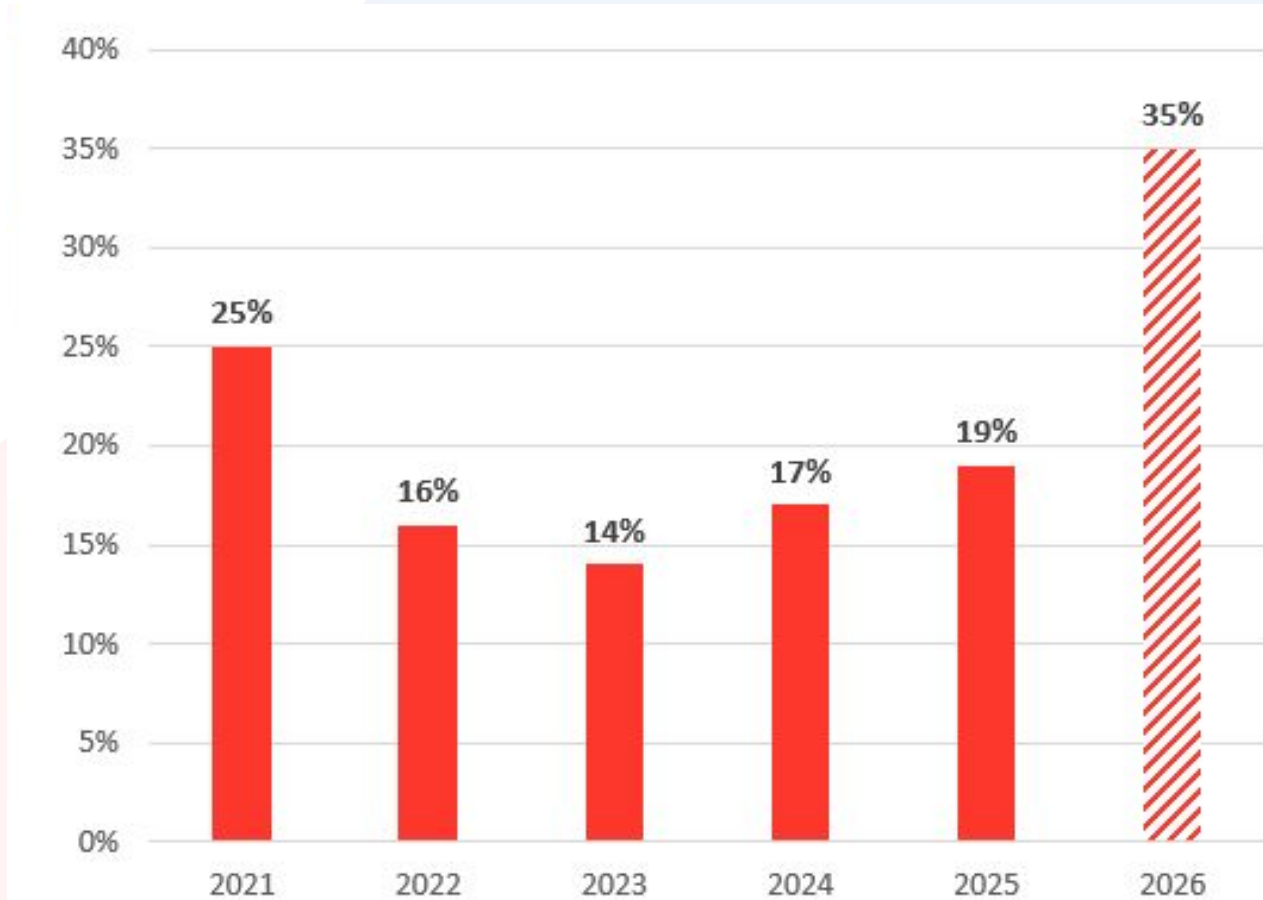
Measure 5: People Experiencing Homelessness for the First Time

- Number of persons who become homeless for the 1st time



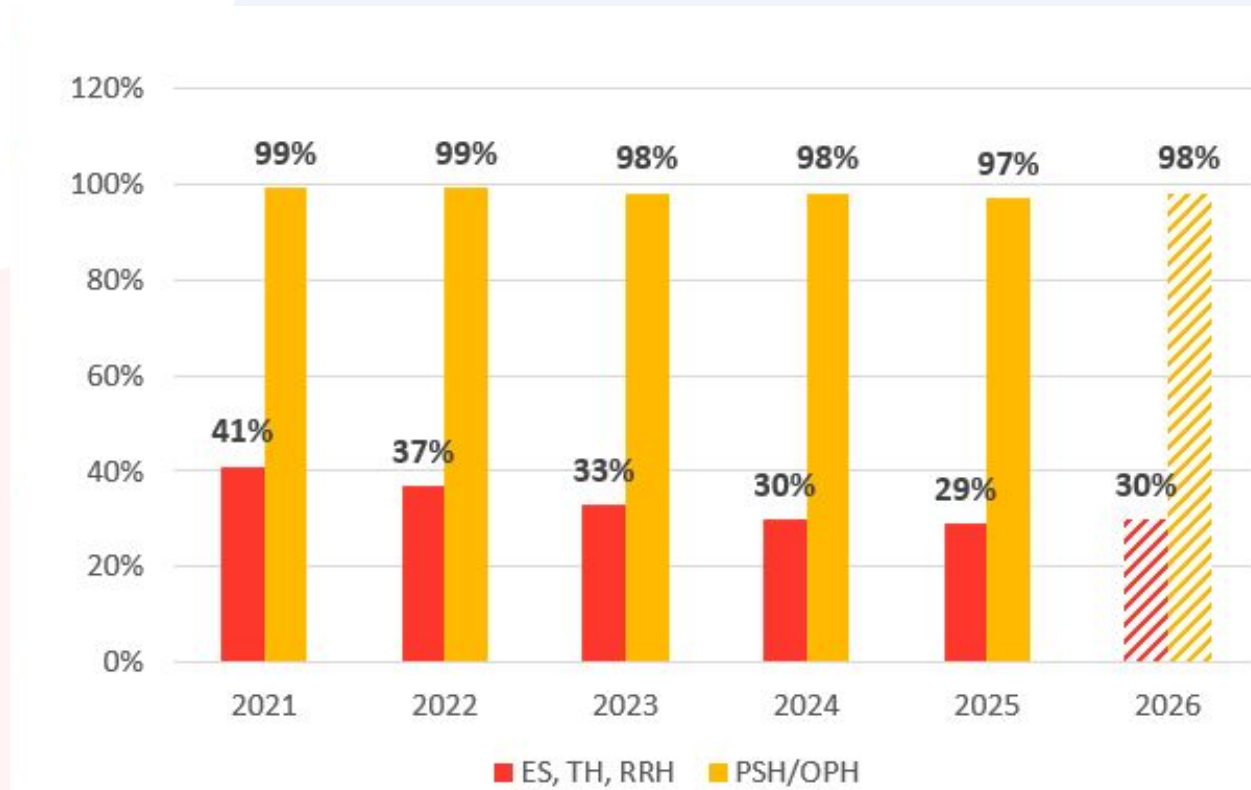
Measure 7a1 : Exits to Successful Destinations

- People that exit to successful situations from Street Outreach projects



Measure 7b1 and 7b2: Exits to and Retention of Permanent Housing

- 7b1: People that exited ES, TH and RRH projects to permanent housing
- 7b2: People in OPH or PSH projects that were placed in PH unit or exited to permanent housing



FY25 – 26 SPM Data Clean-Up Strategy

- Send quarterly Data Quality report corrections and publish public reports
- Host quarterly Data Quality training focused on LSA and SPM errors
- Additional training on reviewing client history and correcting ADHS
- Offer support with one-on-one meetings, including data collection workflow review to ensure compliance with the HUD Data Standards
- Additional training resource development and Federal Reporting web page
- Focus on data quality review during Agency Audits

Conclusions

- Over the past few years, the CoC's system performance has remained consistent, which means that the CoC is **consistently losing points** on the CoC Application
- Improving system performance means more points on the CoC Application, which **increases the likelihood of receiving additional CoC Program funds**
- **Reducing the length of time** people are experiencing homelessness and **increasing exits to permanent housing** from Emergency Shelter will have the **most impact** on improving system performance
 - Permanent housing opportunities with low or no barriers are critical to prioritize housing for those with the longest lengths of homelessness
 - Creative strategies and **additional permanent housing opportunities** are needed in order to increase exits to permanent housing from Emergency Shelter

PPR Goal 8 and Goal 9 - Successful/Stabilized Housing Situations

Both Goal 8 and Goal 9 are both reporting outcome of the homelessness system.

- Supporting clients with housing navigation to exit to successful housing situations
 - Encourages communities to ensure that those placements are also stable
- Retention of Permanent Housing



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Goal 8 - Exiting Clients to Successful Housing

After project exit, clients should be placed into successful housing situations (permanent housing situations). Any move to a sheltered situation is considered a successful outcome for clients in Street Outreach projects.

Applicable Project Types:

- Street Outreach $\geq 20\%$
- Emergency Shelter $\geq 30\%$
- Transitional Housing $\geq 75\%$
- Rapid Re-Housing $\geq 80\%$
- Homelessness Prevention $\geq 90\%$

This measure is collected for all clients exited during the reporting period.

$$\text{Goal 8} = \frac{\text{Leavers exited to successful housing situation}}{\text{Total leavers}}$$



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Goal 9 - Stabilize Clients in Permanent Housing

After being placed in a housing unit, clients should be stabilized by either remaining in their permanent housing project, or by exiting the project to a permanent housing destination.

Applicable Project Types:

- Permanent Supportive Housing $\geq 95\%$
- Other Permanent Housing $\geq 95\%$

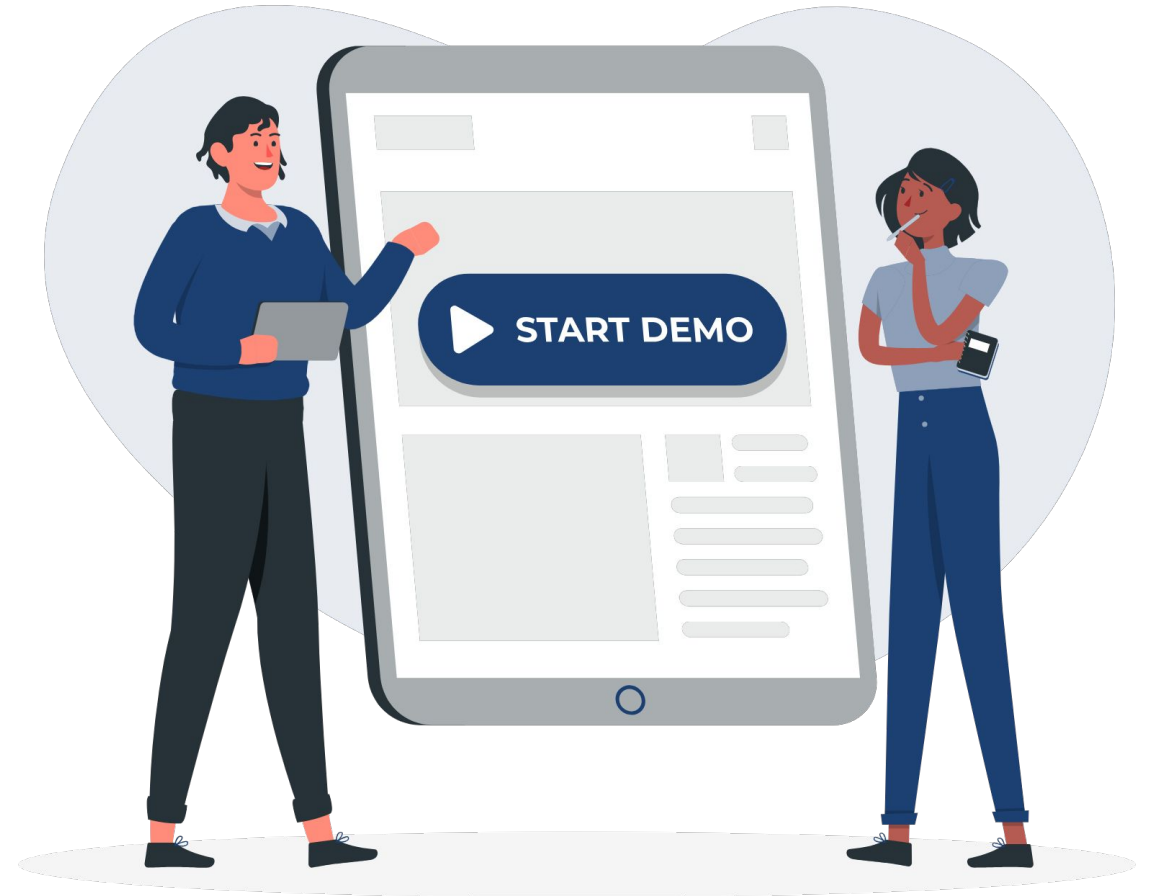
This measure is collected for all clients active during the reporting period with a housing move-in date or who were exited from the project(s).

$$\text{Goal 9} = \frac{\text{Active Clients stabilized in PH (with move-in date) + leavers exiting to PH}}{\text{Total active clients with housing move-in date + all leavers}}$$



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PPR Goal 8 & 9 Details Report - Demo



Graphic by: <https://storyset.com/online>

Project Performance Report (PPR)

The Rapid Re-Housing (RRH) PPRs will be published on our website in the upcoming weeks.

Current and past PPRs can be found on the [Orange County HMIS](#) website, by navigating to: Reports > [Project Performance Reports](#)

Corrections for the Transitional Housing PPR draft data will be uploaded into Dropbox this week.

The [Project Performance Overview](#) is a helpful document that provides important information regarding the PPRs including the thresholds for each goal and our publishing schedule.



Graphic by: <https://storyset.com/online>

Meeting and Resources

The OC HMIS Team will be hosting our quarterly **Data and Performance Management Meeting**. Please join us on Thursday, May 21st via Zoom from 1:00 to 2:00 PM.

See our [HMIS Calendar](#) for additional details.

Community Resources:

Helpful Coordinated Entry Resources may be found on the Office of Care Coordination's [OC CES Academy website](#).

Additional CES Information:

- [ICES Training Materials](#)
- [FCES Knowledge Base Library](#)



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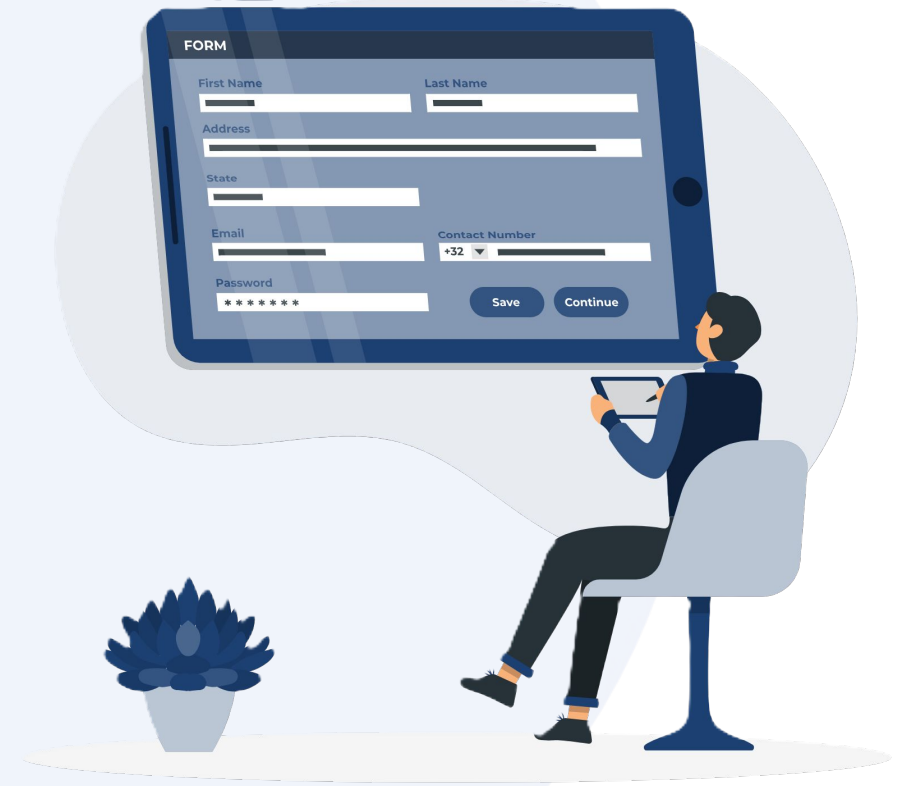
HMIS User Meeting Survey

Our HMIS Team invites users to complete the HMIS User Meeting Survey. The feedback from the survey is used for topics at our monthly user meetings.

We'd greatly appreciate any topics or ideas you're interested in reviewing in the upcoming monthly meetings.

Thank you!

Survey: <https://forms.gle/uzbr17nk87Bm9iv87>



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Holiday

The HMIS Team will be out of the office on the upcoming holiday:

Monday, May 25th in observance of **Memorial Day**.

We will be back in the office **Tuesday, May 26th** to assist you.

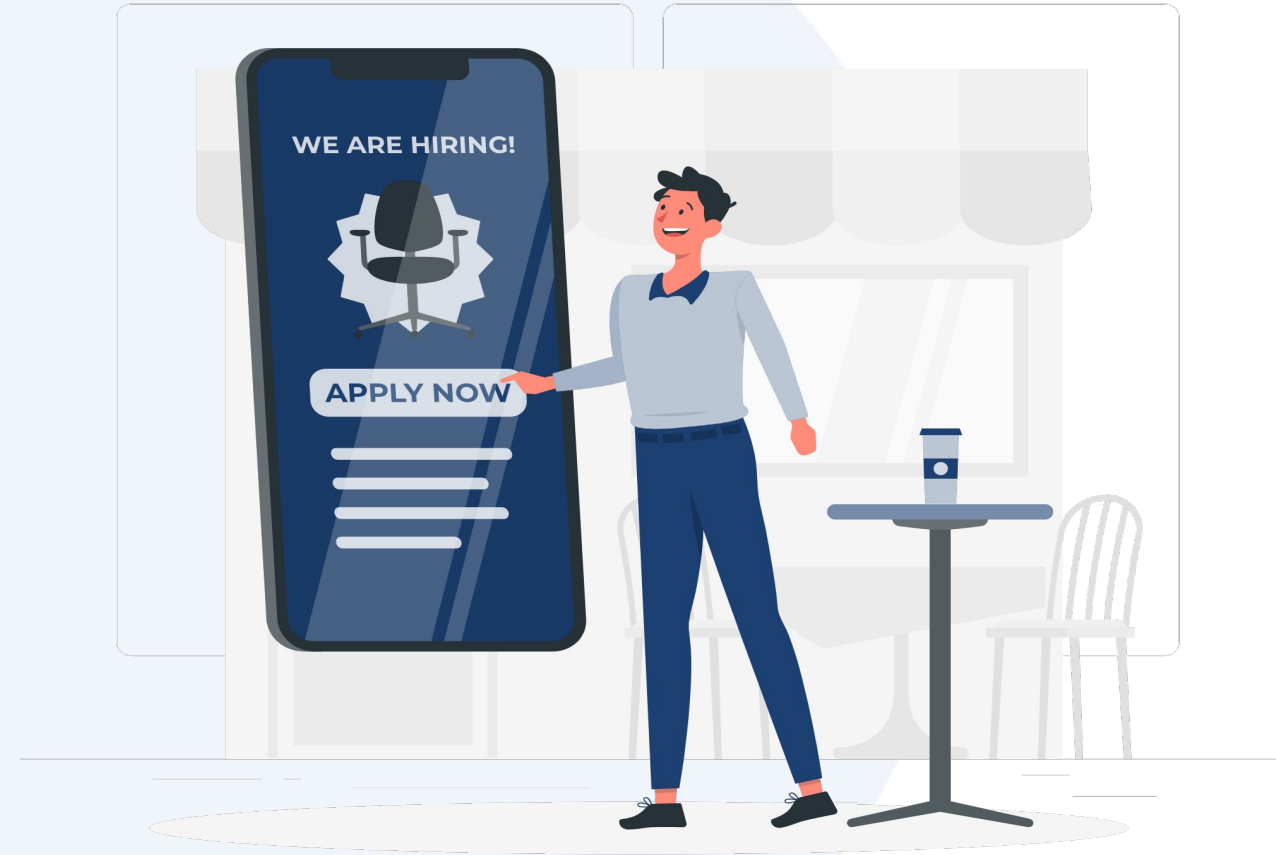


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Job Opportunity

The HMIS Team has a job opening for an HMIS Data Analyst.

If you are interesting in joining our team please review the job opportunity on the Orange County United Way Career page, [HMIS Data Analyst](#)



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Q&A

Reminder: Please enter your agency name in the chat box for attendance

Meeting materials and recording will be available on the [OC HMIS website](#)



**Thank you
Have a great day!**

Next User Meeting: June 3rd





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